MSS3: Shared Reports	Job Aid
Penerting features in Manager Self Service 2 (MSS2) help supervisors track and analyze payre	llandlahar

Reporting features in Manager Self Service 3 (MSS3) help supervisors track and analyze payroll and labor information such as employee schedules, benefits, Time Cards and contact information. Shared reports are a group of preconfigured reports based on attendance, scheduling, coverage, attendance history, employee status and system settings.

To access a shared report:

- 1. Click the Shared Reports menu item in your reporting menu group.
- 2. Click the report group drop-down list to view all of the reports in the group. Report groups are a collection of reports based on a related time and attendance topic, such as scheduling and benefits.

	Manager Day         Find:       Search Employed         Process Payroll         Daily Operations         Scheduling	$\bigcirc$	Shared Reports		Drop-down list
	Find: Search Employe	e	Common Reports 🗸		of configured shared report
	Process Payroll	Ð	Benefit Acitivity Add		
	Daily Operations	$\oplus$	Benefit Bank Activity, per Employee, over Period		
	Scheduling	$\oplus$	Schedules		
	Long Term Care Reports	$\oplus$	Employee schedules suitable for posting		Shared reports
Shared Reports	Reports and Summaries	Θ			for selected
menu item	Shared Reports		Supervisor Edit Report		group
	Personal Information				<u>o</u> r and
	Summary Sheet - Time	Card	Time Card Report		
	Incidents 4.00 - 5.99		Time Card Report, one employee per page.		

3. Click a report title to view its properties, run the report or make a copy.

# **Report Properties**

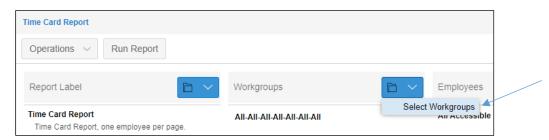
Each report has its own set of properties that determine the content and structure of the report. Properties can be adjusted using their folder menus in the report page.

It is recommended that you make a copy of the report you intend to modify rather than making changes to an existing report. Modifications will affect all users who have access to the report.

Time Card Report		
Operations $\checkmark$ Run Report		
Report Label	Workgroups	Employees
Time Card Report Time Card Report, one employee per page.	Evergreen-Skilled Nursing-All-All-All-All-All	All Accessible Employees
Fields	Grouping	Period
Full Name (Last, First), ID Number, Badge No., Pay Class Name	Each Employee. New page on each new group.	Previous Period
Filter	Attendance Exceptions	Destination
Active Employees		Screen
Auto Run Schedule	Prior Executions	
Not Scheduled to Run	Aug-9 2018 11:10am Today	

To change a report:

1. Click the property blue folder icon and select a feature in the drop-down list.



2. In the property window, select the changes you would like to make. Your selections will appear beneath the property in the report page.

Define Workgroup	Sets				$\otimes$		
Add New	Remove All						
Delete Loc	cation	Update Cancel		Floor			
© Eve	ergreen	<ul> <li>All/Home</li> </ul>	~	All/Home	~		
4		All/Home			•	Selections are	
		Assisted Living				displayed in	
		Hospice				displayed in	
		Skilled Nursing	0-			the property	 Workgroups
			U				Mongroups
						field	
							Evergreen-Skilled Nursing-All-All-All-All-All
				Ok Ca	ancel		

# **Copying Reports**

Reports can be copied, modified and saved to any exisiting report category or to a new category.

To copy a report:

- 1. Click the *Operations* drop-down list in the report page of the report you are copying.
- 2. Select Copy Report (Make Another).

Time Card Report	
Operations $\checkmark$ Run Report	
Copy Report (Make Another)	
Remove Report (Permanently)	Workgroups
Time Card Report Time Card Report, one employee per page.	Evergreen-Skilled Nursing-All-All-A
Fields	Grouping

3. Add a title and description to the report in the *Copy an Existing Report* window. Type the name of the report group you want to add the report to or create a new report group with a name not currently in use.

When adding the report group name of an existing report group, type the name exactly as it appears in the list (including matching upper and lower case letters). If the name does not match, a new group will be created.

Copy an Existing Rep	ort 🛞
Properties	
Report Title:	Skilled Nursing Time Card Report
Hint:	Skilled Nursing only Time Card Report
Report Group:	Common Reports
	Ok Cancel

4. Click **Ok** to save your new report.

### **Running Reports**

Reports can be run by clicking the **Run Report** button or they can be scheduled to run automatically in the report properties by scheduling when the report will run and the users who will receive the report.

To run a report manually:

1. Click the **Run Report** button in the report page.

Time Card Report	
Operations V Run Report	
Report Label	Workgroups
Time Card Report Time Card Report, one employee per page.	Evergreen-Skilled Nursing-All-All-All-All-All

2. Select the report format (Microsoft Excel or PDF) and the destination for displaying the report (screen or mail).

Build Report		$\otimes$	
Properties			Excel or PDF
Format:	Adobe Reader (PDF)		
Destination:	Email ~	-	Email or screen
Recipients:	ManagerNight@company.com; ManagerWknd@company.com		Separate email addresses with semicolon
	Ok Cance	el	

3. If emailing the report, enter the email address in the *Recipients* field.

When entering more than one email address in the Recipients field, separate the addresses with a semi colon.

- 4. Click **Ok** to run the report.
- 5. Click **Ok** in the *Preview Report* window.

Preview Report		$\otimes$
Properties		
Report Details:	"Time Card Report" Created On Au 2018 10:26am by MGR DAY	g-9
Format:	Adobe Reader (PDF)	$\sim$
Destination:	Screen	$\sim$
	Ok Cai	ncel

6. Click **Ok** in the window indicating that your file will download momentarily.



If you selected Screen as the destination, the report file (PDF or Excel) will be downloaded. If you selected Email, the report will be sent to your email and added email addresses with a report preview PDF downloaded to your timeline.

			Destination
			Screen
	•		
	Facility Hours Reporting		
	Administration 🕀		
Report in	Leave Request	Processes	
timeline	Hourly Employees	pdf	

### To schedule the report to run automatically:

\_

1. Click the blue folder icon for the Auto Run Schedule report property.

Not Scheduled to Run	Add N	w Schedule
Auto Run Schedule	$\sim$	Prior Executions

2. In the *Adjust Report Schedule* window, set the day and time the report will run.

Adjust Report Schedul	e				$\otimes$
Properties			Recipients:	ManagerNight@company.com;	
Description:	Time Card Report			ManagerWknd@company.com	
Attachment Type:	Adobe Reader (PDF)	$\sim$			
Time of Day:	8:20a		Subject Line:	Time Card Report	
Sun:			Content Message:		
Mon:					
Tue:					
Wed:					
Thu:					
Fri:					
Sat:					
				Ok Cance	el

3. Select the format of the report.

Properties			
Description:	Time Card Report		
Attachment Type:	Adobe Reader (PDF)		
Time of Day:	Adobe Reader (PDF) Employee List CSV (Unformatted)		
Sun:			
Mon:	Employee List XMLSS for Excel		
Tue:	Full Detail CSV (Unformatted)		
Wed:	Full Detail XMLSS for Excel		

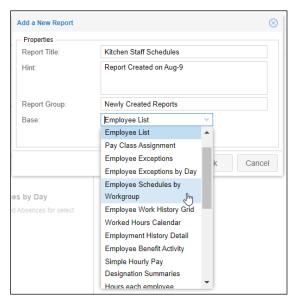
- 4. Type the email address of the recipients, separating multiple addresses with a semi colon.
- 5. Define the appearance of the report with the description, subject line (of email) and add a message if needed.

# **Adding Reports**

1. To add a shared report, click the **Add** button in the *Shared Reports* page.



2. In the *Add a New Report* window, type a title for the report and a description of the report in the *Hint* field.



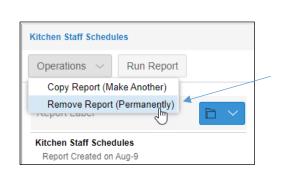
- 3. Type the name of the report group you want the report to be added to. If this is an exisiting report group, be sure to match the name exactly to prevent creating a new group.
- 4. Select the basic structure of the report from the Base drop-down list.

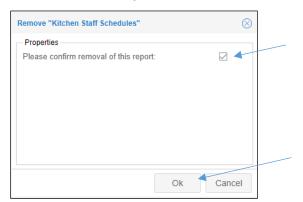
Report structures in the Base drop-down list are predefined in the system.

5. click **Ok** when you have finished updating the fields.

#### **Remove a Report**

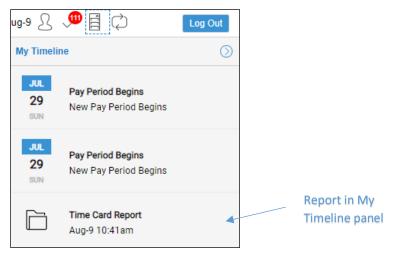
To remove a report from a report group, click the *Operations* drop-down list in the report page and select **Remove Report (Permanently)**. Enable the **Please confirm removal of this report** check box and click **OK**.





# **Regenerate a Report**

A previously run report can be regenerated from My Timeline quick access button. The My Timeline panel contains a sequential list of user activities and system milestones, including recently generated reports. To run a report from My Timeline, click the report.



Select the format and viewing options, screen or email, in the *Preview Report* window. Do not enable the *Remove Timeline Reminder* check box, which is used to delete the report from My Timeline.

Preview Report		$\otimes$	
Properties Report Details:	"Time Card Report" Create 2018 11:10am by MGR DA	-	
Format:	Adobe Reader (PDF)	~	
Destination:	Screen	~	
Recipients:			
			Removes the
Remove Timeline Re	eminder:		report from My Timeline
			ing millenite
	Ok	Cancel	

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